

TOURISM AND OUTDOOR RECREATION

By: the Arizona Office of Tourism

Outdoor Recreation and the Arizona Office of Tourism

The Arizona Office of Tourism (AOT) is the only statewide tourism entity marketing Arizona as a world-class leisure travel destination to national and international visitors. This type of marketing activity brings new money into the state, establishing the travel and tourism industry as one of Arizona's top economic drivers.

Arizona offers visitors a wide range of outdoor recreational experiences from hiking in the Grand Canyon, Monument Valley and Sedona to the distinctive and historic communities of Bisbee, Florence, Prescott and Tombstone. Outdoor recreation on public lands and tribal areas provides opportunities for activities such as picnicking, developed and primitive camping, wilderness backpacking, hiking, mountain biking, horseback riding, cross-country skiing, bird and wildlife watching, hunting, fishing, four-wheel driving, motorized trail biking, all-terrain vehicle riding and snowmobiling, among others. The private sector also provides opportunities for a variety of activities including winter snow activities, water play facilities, nature preserves, vehicle and equipment rentals and guided trips and adventures.

The travel and tourism industry is closely tied to Arizona's unique outdoors appeal, as demonstrated by AOT's effective reliance on outdoor images in its advertising, vacation guides, state maps and agency produced collateral. To maintain this market advantage, it is critical to develop strategies that simultaneously:

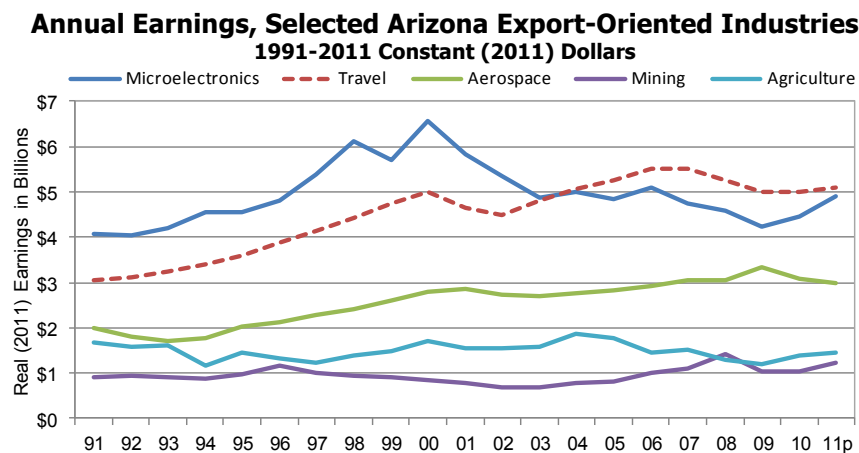
- Enable visitors to effectively learn about, then get out and enjoy the full breadth of Arizona's outdoor adventures; and
- Sustain the very qualities of our outdoors that visitors find so compelling.

Since tourism operates primarily in the private economic sector and public land recreation management operates primarily within the public sector, inherently different motives define their ways of doing business. Nonetheless, there is a critical connection between recreation and tourism in Arizona.

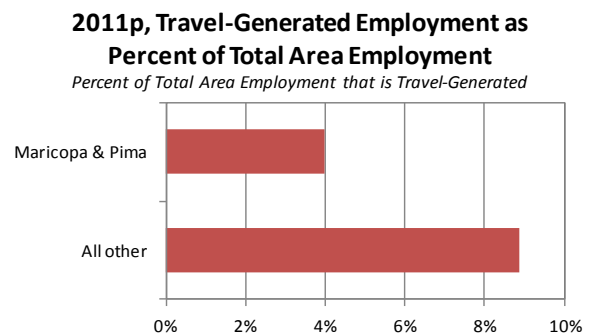
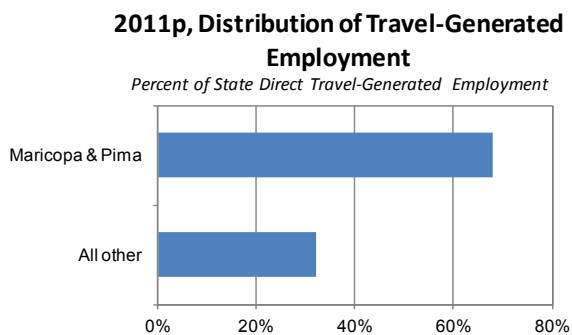
The Impact of Arizona's Travel & Tourism Industry

- 37.6 million domestic and international overnight travelers visited Arizona in 2011, spending \$18.3 billion. This means that an estimated \$50 million of direct travel spending is injected to our state's economy every single day.
- Direct travel spending generated 157,700 industry-related jobs in 2011. In turn, this resulted in \$5.1 billion in earnings generated by Arizonans employed by travel and tourism jobs.
- As a result, direct travel spending resulted in \$2.7 billion in local, state and federal tax revenues.
- No other Arizona industry produces the same economic impact for the Grand Canyon State as the Arizona tourism industry. Tourism is Arizona's top export-oriented industry and directly impacts all 15 counties.

Figure XX. Annual Earnings, Selected Arizona Export – Oriented Industries



- As one of Arizona top economic drivers, tourism is significantly important to all Arizona communities. The graphs below shows the two most populous counties in Arizona, Maricopa and Pima, compared to the 13 other counties in the state with respect to their share of total employment. The bar graph on the left (in blue) shows that nearly 70 percent of travel-generated employment is within the counties of Maricopa and Pima. But in referencing the bar graph on the right (in red), travel employment is actually more significant in the rural areas of the state.

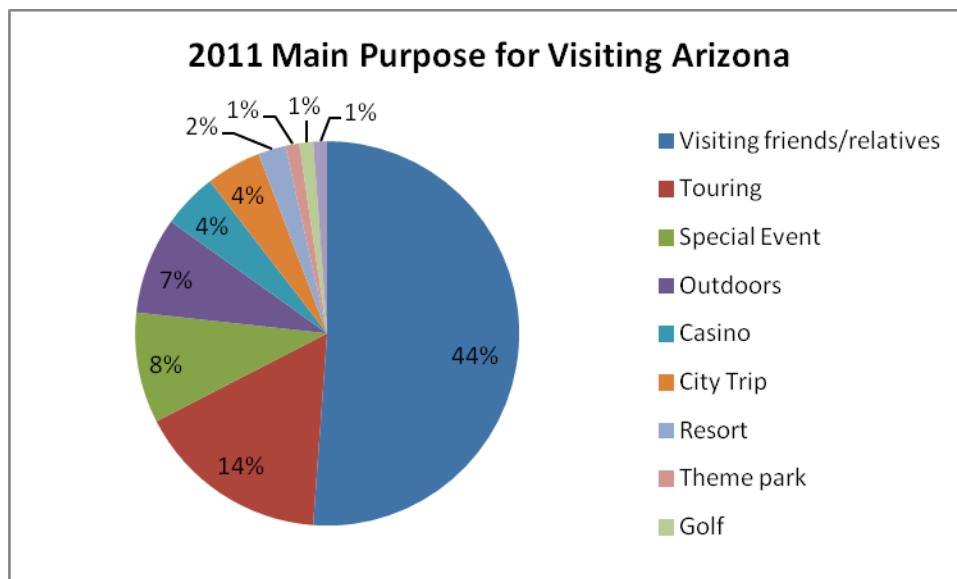


Profile of Arizona's Domestic Visitor

- In 2011, 32.8 million total overnight domestic visitors traveled to Arizona. *International visitors make up nearly 13 percent of the state's total visitation (37.6 million). For the purpose of this report, the following profile information reflects Arizona's **domestic** visitor only.*
- 82.3 percent of Arizona's domestic visitors were considered leisure visitors. These visitors listed "visiting friends and relatives" as the primary reason for visiting Arizona, followed by "touring and participating in a special event".
- 71.7 percent were non-residents primarily traveling from California, Texas, Washington, New Mexico and Illinois.
- Domestic visitors stayed in Arizona an average of 4.0 nights and traveled with an average of 2.7 people.
- The typical visitor to Arizona was 47.2 years old with an average income of \$74,660.
- The most used mode of transportation was the automobile at 50 percent, followed by air at 20 percent and rented automobile at 14 percent.
- 68 percent of domestic visitors used "paid accommodations" which included the use of "campground/trailer park/RV park," which is seven percent of the "paid accommodations" category.

Many of Arizona's outdoor recreation destinations are located in rural Arizona. Visitors to the state can experience 30 Arizona State Parks, six National Forests, 22 National Parks, numerous Monuments & Historic Sites, eight National Wildlife Refuges, eight Bureau of Land Management Field Districts, 22 Tribes and 23 State Wildlife areas.

While many visitors to Arizona experience outdoor activities, of all domestic visitors to the Grand Canyon State seven percent say experiencing the outdoors is their primary reason for visiting. This is indicated in the chart below. This differs when you compare rural vs. urban Arizona. Thirteen percent of visitors to rural Arizona say experiencing the outdoors is their primary reason for visiting, compared with three percent of visitors to urban Arizona.



The table below shows that those that participate in outdoor recreational activities tend to do this in rural Arizona:

Activity	Total	Rural	Urban
Shopping	31.30%	28.20%	33.30%
Fine dining	23.10%	22.70%	25.40%
National/state park	20.80%	30.30%	16.90%
Casino	17.40%	20.10%	14.50%
Landmark/historic site	17.10%	22.20%	15.30%
Swimming	14.30%	10.90%	15.00%
Hiking/backpacking	13.80%	19.10%	11.50%
Bar/disco/nightclub	13.50%	14.70%	12.10%
Museum	12.50%	13.90%	11.90%
Beach/waterfront	9.20%	9.40%	3.60%
Art gallery	9.00%	10.70%	7.60%
Camping	7.10%	10.70%	4.10%
Golf	6.30%	5.30%	6.70%
Theater	6.20%	5.00%	5.50%
Business Meeting	5.90%	2.90%	6.80%
Fair/exhibition/festival	5.60%	6.60%	5.80%
Fishing	5.40%	8.60%	2.10%
Professional/college sports event	5.40%	2.70%	7.50%
Biking	5.20%	6.10%	3.30%
Zoo	5.20%	3.10%	5.90%
Spa	5.10%	4.60%	4.40%
Dance	4.10%	4.50%	4.00%
Boating/sailing	4.00%	6.20%	1.60%
Brewery	3.90%	5.00%	3.20%
Theme park	3.80%	1.40%	2.20%
Business Convention/Conference	3.20%	0.90%	3.20%
Winery	2.80%	2.80%	2.30%
Rock/pop concert	2.40%	2.00%	1.90%
Mountain climbing	2.20%	2.00%	2.00%
Rafting	2.10%	2.60%	1.60%

Tourism Programs to Promote Outdoor Recreation

AOT's consumer advertising efforts recognizes outdoor recreation as an important activity travelers want to experience while visiting Arizona, with one of the three behavioral categories going after that exact type of visitor: (1) immersion/entertainment tourist; (2) the outdoor tourist; and (3) the relaxation tourist. Arizona's outdoor visitor enjoys low-exertion activities in beautiful and distinctive outdoor locations different from what they have available to them at home. For example, Arizona offers unique desert and mountain vista scenery, interactive guided tours, and other green-based adventures. AOT's primary consumer advertising campaign takes advantage of this area of interest and promotes dramatic images of Arizona's outdoor recreation opportunities located across the state, as well as its unforgettable signature scenery.

When looking at the most recent advertising effectiveness study, conducted by SMARI (Strategic Marketing and Research, Inc.), a group of potential Arizona travelers were surveyed to determine how Arizona ranked in comparison to some of our top competitors. Arizona scored high in a few areas that related to outdoor recreation:

- Great for visiting state/national parks (rated high at 104, only California and Colorado scored higher. Tied with Utah, and outranking Florida, Hawaii, Nevada, New Mexico and Texas)
- Great for outdoor adventure (rated high at 100. Outscoring Florida, Nevada, New Mexico and Texas)

In looking at the visitor segments for Arizona, the following categories were identified, which also estimates the distribution of the actual Arizona visitor. The total makeup of an outdoor traveler is 35%.

- Parks and Culture – 18%
- Urban Entertainment – 16%
- Outdoor Adventure – 17%
- Spa Experience – 18%
- Spring Skiers – 12%
- Golf and Sports – 19%

When broken down by market, here's what we see:

Segment	Los Angeles	Chicago	Secondary	Other National
Parks & Culture	16%	20%	22%	18%
Urban Entertainment	15%	22%	10%	18%
Outdoor Adventure	21%	12%	11%	18%
Spa Experience	16%	12%	25%	17%
Spring Skiers	15%	16%	12%	11%
Golf & Sports	17%	18%	20%	19%

In addition, outdoor activities such as “state or national parks” scored highest in nearly every market:

Arizona Trip Motivators	Los Angeles	Chicago	Secondary	Other National
Visit state or national parks	23%	34%	28%	30%
Touring/sightseeing	19%	38%	28%	23%
Visit historic sites	15%	14%	15%	12%
Water activities (boating/swimming/water sports)	10%	10%	6%	3%
Attend a baseball spring training game	10%	12%	8%	3%
Outdoor adventure	10%	8%	8%	9%
Shopping	10%	10%	8%	7%
Visit a casino	8%	6%	4%	6%
Experience unique local dining	8%	10%	7%	3%
Play golf	6%	12%	12%	10%
Experience the culture of the Old West	5%	8%	9%	10%
Visit a museum or art gallery	5%	2%	4%	5%
View wildlife/birds	5%	2%	2%	3%
Camp	5%	2%	3%	2%
Take in Native American culture	4%	2%	7%	10%
Attend a professional or college sporting event	4%	0%	3%	5%
Visit a spa	4%	6%	6%	3%
Attend a concert, theater or performing arts	4%	0%	2%	3%
Experience fine dining	2%	2%	2%	3%
Ski/Snowboard	1%	0%	0%	1%
Nightlife/dancing	1%	0%	1%	3%
Take in Hispanic culture	1%	2%	1%	3%
Visit a vineyard or brewery	0%	0%	1%	2%

In addition to consumer advertising efforts, AOT produces many other marketing materials to encourage visitors to experience Arizona's outdoor adventures.

Official State Visitors Guide

With an annual circulation of 550,000, Arizona's *Official State Visitors Guide* is the official fulfillment publication for AOT's marketing purposes. It is the only magazine included in AOT's standard travel packet that is given to domestic and international consumers requesting the information. It is the largest and most complete visitor publication for the state and features detailed Arizona travel information along with colorful statewide photographs.

When ordering the OSVG, consumers can indicate an interest in various Arizona travel and tourism activities. Of those consumers that have requested an OSVG in the past five years, here's how outdoor recreation-type categories have scored:

- Nature – 48%
- Adventure – 39% (not sure if this directly applies, since it's pretty broad)
- Horseback – 18%
- Animal Watching – 16%

Official State Visitors Map

With an annual circulation of 650,000, the State Visitors Map is the official fulfillment map for AOT. It is included in the standard travel packet and provided to all requesting consumers.

arizonaguide.com

AOT provides Arizona travel information on its consumer website, www.arizonaguide.com. Information on this site identifies the recreation opportunities located throughout the state in a special section titled “Outdoor Adventure” with links to additional information.

Arizona’s Recreation and Cultural Sites Map (online and printed)

AOT, in collaboration with the Arizona Council for Enhancing Recreation & Tourism (ACERT), offers the Recreation & Cultural Sites Map to visitors wanting to explore and experience Arizona’s outdoor offerings. The map is available in both an online and printed format.

ACERT is a group of federal, state, universities and not-for-profit organizations working together to bring attention to the diverse cultural and recreation visitor opportunities on public lands and tribal areas throughout the State of Arizona. ACERT is comprised of the Arizona Commission on the Arts, Arizona Game and Fish, the Arizona Office of Tourism, Arizona State Parks, Bureau of Land Management, the National Park Services, and the National Forest Service.

ACERT has produced a printed version of the Recreation & Cultural Sites Map for the past two decades. The popular visitor resource promotes Arizona’s national parks and monuments, federal recreational areas, Bureau of Land Management (BLM) sites, State Parks, Tribal attractions, and statewide cultural and historical locations.

Information found on the map details where travelers can boat, fish, raft, canoe, swim, view mountain vistas or wildlife, find cultural and historical locations, ride equestrian trails, locate hiking or biking trails and campsites all through Arizona.

The interactive map is hosted on The Arizona Experience website, which commemorates Arizona’s Centennial and is a great companion website to AOT’s consumer website, arizonaguide.com. The Arizona Experience website offers an online portal to the people, places, innovations and events that have defined our past and are shaping our future. Additionally, the site provides aerial videos of iconic Arizona landscapes, interactive maps, historic timelines, oral histories and informative articles, videos and slide shows that encapsulate Arizona’s past, present and illuminates its future.

The online map can be viewed at arizonaexperience.org. A printed version of the Recreation & Cultural Sites map is still available and can be found at the more than 60 Local Visitor Information Centers. It can also be picked up at State Parks, National Parks, BLM, U.S. Forest and AZ Game and Fish sites located across Arizona. Printed maps are also available from AOT.

Arizona Scenic Roads

There are currently 27 routes in Arizona designated as Parkways, Historic and Scenic Roads. The routes are located in areas throughout the state and encourage travelers to see the scenic and historic beauty of Arizona. These routes also provide an opportunity for visitors to participate in outdoor recreation since many of the routes are located in communities with a diversity of outdoor activities, attractions and experiences.

AOT partnered with *Arizona Highways* magazine and the Arizona Department of Transportation (ADOT) to promote awareness of Arizona's scenic roads and outdoor recreation by creating a new website – www.arizonascenicroads.com. This innovative site is easily navigable. Loaded with more than 120 vibrant, color photographs it offers an interactive map of Arizona that organizes driving tours according to the interest and schedule of the traveler. Visitors can search through the site based on the state's five major regions – West Coast, North Central, Northern, Phoenix & Central and Tucson & Southern. Development of the site was funded by a Federal Highway Administration grant.

Visitor Information

AOT currently operates a Welcome Center on Interstate 40 in northeastern Arizona. The Center located at the Arizona/ New Mexico state line is open seven days a week to accommodate and service visitors. The Center is staffed by three professional travel counselors who provide a variety of visitor information services as well as disseminate travel literature. Itinerary planning assistance is often times requested and this includes suggested visits to national and state parks to fully experience Arizona's outdoor recreation opportunities.

Additionally, AOT works with more than 60 Local Visitor Information Centers in communities throughout Arizona and provides agency destination and collateral materials including the Official State Visitors Guide, the Arizona Official State Map as well as other promotional material.

Arizona Tourism University (ATU)

Driven towards AOT's industry partners and constituents, the Arizona Tourism University workshops have been created to assist the Arizona tourism industry and public to further their education in the field of tourism. Some workshop topics have been geared towards educating local communities on how to further develop their outdoor travel and tourism opportunities for visitors to experience. Each fiscal year (July through June) AOT offers topic-specific educational workshops. All workshops are complimentary and offered to the public. Generally, AOT offers each workshop topic is offered in two communities and a webinar so that everyone can participate. All past workshop tool kits and presentations are available online at www.AZOT.gov.

Past workshop topics include:

- How to Write a Marketing Plan
- Strategies for Successful Destination Marketing
- How to Create an Interactive Marketing Strategy
- Social Media
- Branding
- Customer Service
- How to Work with Tour Operators and Travel Agents
- How to Build an Itinerary
- How to Conduct a Visitor Survey
- The Economic Impact of the Tourism Industry in Arizona
- Geotourism
- Wildlife Viewing as a Tourism Attraction
- Cultural Tourism
- Crisis Communications
- Advocacy
- Grant Seeking and Grant Finding for Tourism Related Projects

Other Partnerships

In addition to AOT's multiple industry partners, the agency is also working in collaboration with the Arizona Watchable Wildlife organization. The Arizona Watchable Wildlife Tourism Association promotes Arizona's enormous wildlife watching opportunities for residents and visitors. This should reap statewide economic benefits, personal economic benefits for members, as well as help conserve those special places that make Arizona unique. AWWTA's goals are to promote and advocate our birding and wildlife watching tourism industry through partnerships, marketing, education, conservation and adherence to ethical and sustainable practices.

Tourism Research that supports Outdoor Recreation

Below is a list of reports administered through the Arizona Office of Tourism within the last five years that offer some type of support to the outdoor recreation industry. All report can be found on www.AZOT.gov.

2011 Arizona Sustainable Tourism Practices: Arizona Benchmark Study

The study found that Arizona's tourism industry is doing a great deal to build a more sustainable future. Large percentages are knowledgeable about sustainability issues, and are responding to community and customer concerns. The majority of organizations are recycling, reducing waste, conserving water and energy, and are celebrating local cultures and sourcing local products. More than 60 percent of Destination Marketing Organizations (DMOs) are involved in sustainable tourism programs or activities. The table below shows the types of sustainable programs that Arizona destinations/DMOs are involved in which shows that many of these programs are related to outdoor recreation:

What types of sustainable programs is your destination/DMO currently involved in?

Programs	Percentage
Cultural and heritage programs	82.4%
Art Walk or Historic Walk	79.4%
Bird/wildlife watching	67.6%
Historic preservation programs	61.8%
Farmers Market	55.9%
Ecotourism programs	44.1%
Dark Sky programs	44.1%
Local grown/organic foods program	41.2%
Sustainability events	41.2%
Guided interpretive hikes	41.2%
Geotourism programs	38.2%
Urban trail system	29.4%
Indigenous heritage programs	26.5%
Alternative transportation	20.6%
Wayfinding signage programs	17.6%
Green guide to the destination	17.6%
Carbon offset program	2.9%

2011 Arizona Wine Tourism Industry

The purpose of this survey of visitors to Arizona's wine regions was to gather market research on this growing industry, including visitor demographics, travel patterns, satisfaction with the experience and spending patterns. Even experiencing wine can be related to outdoor recreation. Nearly 30 percent of those that have a wine experience within Arizona relate this to a reason to "participate in outdoor recreation activities (hiking, mountain, biking, etc.)".

Arizona's Community Surveys

Arizona's statewide communities thrive on the ability to offer outdoor recreation to visitors. Here is a list of the communities surveyed:

- 2010-2011 Wickenburg Tourism Study
- 2010-2011 Kingman/Grand Canyon West Tourism Study
- 2010-2011 Yuma Tourism Study
- 2008-2009 Globe-Miami Tourism Study
- 2008-2009 Prescott Area Tourism Study
- 2008-2009 Flagstaff Tourism Study